



Using the Add/Edit Family Tool

Adding or updating the Address, Email or landline phone:

1. Click **Contacts** and locate one member of the family.
2. Click the **Tools** button and choose the **Add/Edit Family** tool.
3. Update the address.

Adding new family members to an existing family

1. Open the contact record for any member of the family and click the **Tools** button
2. Choose **Add/Edit Family**
3. Click the **Add New Family Member** link at the bottom of the screen.
4. Complete as much information as is available for the new family member.
5. Click **Save** and **Close**.

Adding a parishioner to your parish

Prior to Ministry Platform, you had to add people to your database if they were joining your parish or if they were participating in Religious Education or a school family. Ministry Platform is a centrally located database and it lets parishes add another parish's contacts to your events and groups for special circumstances like Religious Education training, Sacraments and attending your school.

1. Did you get a formal registration indicating the family would like to join your parish:
 - a. Yes, I received a registration form: **Proceed to step 2.**
 - b. No, they are not joining my parish. They are taking part in the following groups
 - **Religious Education:** Add the student to the formation group you created and then stop. You don't need to do anything else in the family record.
 - **Sacrament:** Update their sacraments using the Add/Edit Sacrament tool and then stop. You don't need to do anything else in the family record.
 - **School Family:** Add the student to the school group you created and then stop. You don't need to do anything else in the family record.

2. Click **Contacts and then click the **Tools** button.**

3. Choose **Add/Edit family** tool.
4. Click in the **Search** field and type your search like this **Last Name, First name**. Example: Doe, John.
5. Does the Family Exist in MP?
 - a. **Yes, they do exist in Ministry Platform:**
 - a. Change the Congregation to yours
 - b. Double check the information on the Add/Edit Family tool for each of the members editing the text where needed and using the **Add new Family Member** button to add additional members.
 - c. Click **Save** and **Close** and continue to the instructions under the heading **Assigning an envelope number and salutations.**
 - b. **No, they do not exist in Ministry Platform.** Click the **New Family** button and continue to step 6.
6. Choose your parish from the **Congregation** drop down.
7. Enter address information at the top of the screen.

8. Enter information pertaining to each person – completing as many fields as you are able.
- Click the **More** button to reveal all of the fields.
 - Usually, for couples, the male would be **Head of Household 1**.
 - Check the box to create a **Donor** record. Usually, you would click that box for the male Head of Household unless he is not Catholic. You only need one Donor record unless HOH's are giving separately.
 - Be sure to check the **Heads are married** field for married couples.

Situation	Member Type
Registered Parishioners	Registered Member
Non-Catholic spouses who wish to join the parish:	Enter their contact details as you would any other member of the family. Be sure to fill out the Religion field as is appropriate.
Non-Catholic spouses who do not wish to receive mail from the church:	Household Position = Other adult; Member Type = Non-Member Contact Status = Inactive Religion = Choose the appropriate designation.
Former parishioners who have become Inactive	Non member
People attending Religious Education classes who are not already in Ministry Platform anywhere in the Diocese	Faith Formation Family
People attending your Catholic School who are not already in Ministry Platform anywhere in the Diocese	School Families
people associated but not registered with any parish in DioErie: <ul style="list-style-type: none"> Receiving sacraments, Being entered for the recording of clearances, Attending events such as Bible Study Some other way associated but not registered 	Associated Member
People who have given to your parish who are not already in Ministry Platform anywhere in the Diocese	Donor Only
Guests or Visitors	Guest/Visitor

9. If there are children or other adults living in the household, use the Family Member 3 and 4 sections and click the **Add New Family Member** button for additional persons.

Note If other adult donors are living in the same household, it would be best for them to be set up in a separate family record even if the address is the same.

10. Click **Save** and **Close**.

Assigning an envelope number:

The envelope number is usually assigned on the husband's record but it doesn't have to be. These instructions assume you are adding a married couple. If the head of household is a single woman, you would follow these instructions for her instead of the husband.

- Click **Contributions > Donors** and choose the view **Last Envelope Number** to make note of the next available envelope number or scroll down to see where there may be gaps and use one of those numbers.
- Click **Contributions** and choose **Donors**.

13. Search for the Head of Household for whom you created the donor record.
14. Click on his/her record to open it and click the **Edit** button
15. Enter an envelope number in the **Envelope No** field and click the **Save** button
16. Under the **Contact** heading, click the blue jump link.
17. Click the **blue link** next to the **Family record**, click **Edit Record** and enter today's date as the **Registration Date**.

Entering sacraments for all family members:

Refer to these instructions for entering any sacraments for which you have information.

<https://www.eriercd.org/images/pdf/computer/mp/Sacraments.pdf>